CONSUMER TRUST IN THE FOOD SYSTEM

This information is wholly owned by the Foundation for Food Integrity and licensed to CFI; Study was conducted by Gestalt Inc.
To build consumer trust and confidence in today’s food system.

We accomplish our mission by:

- Designing and developing models that fundamentally define and communicate trust
- Research consumer attitudes and new approaches to building trust
- Engage stakeholders across the food system to work together on building trust
- Develop programs and messages that create better understanding of today’s food system resulting in enhanced consumer trust
Online Presence

www.foodintegrity.org

www.choose2choose.org

www.bestfoodfacts.org

www.cfiengage.org

www.farmersfeedus.org
Earning and maintaining THE SOCIAL LICENSE

Confidence → Trust

Competence

Influential Others

Value Similarity

Trust research was published in December 2009 — Journal of Rural Sociology
Shared values are 3-5x more important in building trust than demonstrating competence

Trust research was published in December 2009 - Journal of Rural Sociology
Balancing for Success

Economically Viable
- ROI
- Demand
- Cost Control
- Productivity
- Efficiency
- Profitability

Scientifically Verified
- Data Driven
- Repeatable
- Measurable
- Specific
- Objectivity

Knowledge

Ethically Grounded
- Compassion
- Responsibility
- Respect
- Fairness
- Truth
- Value
- Similarity

Feelings
Belief
Quantitative Research
The 2012 Consumer Trust Research was funded by the Foundation for Food Integrity.

FFI’s mission is to fund consumer research and provide information and support consumer education about today’s food.
THANK YOU

2012 National Research Sponsors

DMI DAIRY MANAGEMENT INC.™

FARM CREDIT
Lending support to rural America™

MONSANTO

CropLife AMERICA

Rabobank

American Farm Bureau Federation®

Our Soy Checkoff
Progress Powered by U.S. Farmers

U.S. Farmers & Ranchers Alliance®
THANK YOU

2012 Research Supporters
THANK YOU

2012 State Research Sponsors
Methodology and Sample Design

Total of 2,001 completed surveys in July 2012 (sampling error at 95% confidence level +/- 2.2%)

Reflects general US population for education, income, political orientation, consumer advocacy, vegetarianism. Split sample to accommodate the survey content.
2 MODELS
Past research has shown that the adopter segments are normally distributed in a social system/market (bell curve)
Information Seeking Behaviors

- I’m quick to form opinions on the issue and rarely rely on others for input (Innovator)
- **I actively seek information on the issue so I can weigh the issues and have informed opinions (Early Adopter)**
- I usually make up my mind about food safety issues after others have debated the issues at length (Early Majority)
- I don’t really think about the issue unless I happen to hear something on the radio or see something on TV (Late Majority)
- I only think about the issue if I’m forced to (Laggard)
Attributes of Early Adopters

Adapted from Rogers - 2003

**Socio-Economic**
- More educated
- Higher social status
- Greater upward mobility

**Communication behavior**
- Larger interpersonal networks
- Greater exposure to mass media and interpersonal communication
- Information seekers
- More knowledge of innovations
- Opinion leaders

**Personality**
- Greater empathy
- Less dogmatic
- Greater ability to deal with abstractions
- Greater rationality
- Higher intelligence
- More favorable toward change
- Able to deal with uncertainty and risk
- More favorable attitude toward science
- Less fatalistic
- Have higher aspirations
Early Adopters

• Nutrition – 47% consumers - >Women

• Food Safety – 37%

• Use of Technology/Innovation to Grow Food – 31% - >Men

• Environmental Sustainability – 31%

• Humane Treatment of Farm Animals – 27% – High innovator class
Values Orientation

- Agriculture and the food system tend to be science driven. Science tells us if we **can** do something, society tells us if we **should** do it.

- The food community has long been frustrated that “scientific evidence” isn’t definitive in generating consensus or public support for today’s practices.

- Your values-orientation strongly influences what you believe agriculture and those in the food system **should** do.
Values Orientation = The window through which individuals view society and how that view influences the perception of self and others.

- Adopter categorization and values orientation are issue specific
- Consumers frequently hold multiple Values Orientations on a single issue
- We can increase support for today’s food system practices if we present information that effectively communicates practices that are aligned with consumers’ values orientations
Using Values Orientation is not about trying to get someone to change their values and beliefs about today’s food.

It is about helping them understand that today’s food is better aligned with their values and beliefs than perhaps they thought.
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-Have a fatalist world view
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**SOCIALLY-DISORIENTED**
- Have a world view of someone who is **socially disoriented**
- Used to believe they understood how things worked in the world, but not anymore
Consumers can be grouped by Values Orientation in general but the data in this study indicates that the Values Orientation viewpoint shifts depending on the issue under study.

**ISSUE:** Hormone Use to Produce Leaner Beef

Maria is generally a **progressivist**

Concerns about her daughter’s health lead her to be a **traditionalist** on beef hormone use.
Please rate the degree to which you agree or disagree with the following statements. You can use any number between 0 and 10 to express your opinion.

- We do not need to use newer farming methods such as genetically modified crops (TRADITIONALIST 7-10; PROGRESSIVIST 0-3)
- There should be less government regulation on farmers' growing of genetically modified crops (INDIVIDUALIST 7-10)
- The government should do more to regulate the growing of genetically modified crops (COLLECTIVIST 7-10)
- I have little control over whether genetically modified crops are in the food I eat (FATALIST 7-10)
- I am overwhelmed by the complexity of the issues related to genetically modified crops (SOCIALY DISORIENTED 7-10)
Values Orientation Goal

Find the smallest number of messages that have the greatest impact on the largest number of people in the target population
Moving the Needle:

Educating Consumers on the Benefits of Food Production Technology
Attitudinal Measurement

Experimental Design

- Measure Benchmark Attitudes
- Introduce Educational Information
- Measure Believability
- Measure Impact on Confidence in Food System
- Re-measure Attitudes
Five Food Production Technologies Tested

- Use of Genetically Modified Crops
- Hormone Use to Produce Leaner Beef
- Raising Animals in Indoor Production Systems
- Use of Antibiotics in Meat-producing Animals
- Use of Crop Protection Products
Education on Food System Issues

Moves the Needle

- Use of Genetically Modified Crops: +10 to +15 pts.
- Hormone Use to Produce Leaner Beef: +7 to +11 pts.
- Raising Animals in Indoor Production Systems: +11 to +16 pts.
- Use of Antibiotics in Meat-producing Animals: +10 to +14 pts.
- Use of Crop Protection Products: +6 to +8 pts.
Key Learnings
Consumer Concerns About Life and Current Events
6 out of 7 Most Concerning Life Issues are Beyond the Consumer’s Direct Control

Some degree of control

Growing Federal Deficit 63%*
Growing Financial Situation 63%*
Personal Financial Situation 63%*
Rising Energy Costs 67%*
Rising Cost of Food 69%*
Unemployment in U.S. 70%*
Rising Health Care Costs 72%*
U.S. Economy 74%*

Food System Concerns*
Imported Food Safety (59%)
Food Safety (58%)
Enough to Feed U.S. (53%)
Crop Chemical Residue (50%)
Humane Treatment of Farm Animals (44%)

Lowest concern was for having enough food to feed people in developing countries (29%)

Earlier adopters were more concerned about most issues than later adopters

Women were more concerned about most issues than men

*Top Box ratings (8-10)
Levels of Concern about the Food System Are Growing Faster Than Other Concerns

Change in Top Concerns 2011-2012
- U.S. Economy (+2%)
- Rising Health Care Costs (+2%)
- Rising Cost of Food (+2%)
- Rising Energy Costs (+1%)
- U.S. Unemployment (-1)
- Personal Financial Situation (-1)

Change in Food System Concerns 2011-2012
- Safety of Imported Food (+4%)
- Food Safety (+5%)
- Enough to Feed U.S. (+2%)
- Humane Treatment of Farm Animals (+2%)
- Environmental Sustainability Farming (+5%)
Food System

Right Direction/Wrong Track

31% WRONG TRACK
30% RIGHT DIRECTION
39% UNSURE

Early Adopters
Roughly 40%
Believe the food system is on the wrong track

Nearly 40% Right Direction
Nearly 50% Unsure

N=2001
Sources of Information About the Food System
Consumers Check-in with Friends and Family, Search Online, and Watch Local TV for Info on Food System Issues

Ranked First as Info Source on Food System Issues

FRIENDS AND FAMILY

26%
Highest for Innovators

WEBSITES
25%
Highest for Early Adopters

LOCAL TV STATION
20%
Higher for Early Majority, Late Majority and Laggards
Facebook is the #1 Connection Site

With Food Bloggers

- Facebook: 28%
- News Media Sites: 19%
- Food Sites with Recipes: 17%
- Food Sites with Information on Common Questions: 16%
- Food Blogger Sites: 11%
- Twitter: 10%
- None: 51%

Early Adopters
Facebook: 37%
None: 35%
Actions Taken When Questions Arise About Food Safety and Intensive Farming Practices
Consumers Search Online for Info

And Talk to Family and Friends When Food Safety Question Arises

**Action Taken (Top Mentions)**

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<th>Action Taken</th>
<th>% Likely*</th>
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<tr>
<td>Search for more info online</td>
<td>45%</td>
</tr>
<tr>
<td>Tell friends and family</td>
<td>44%</td>
</tr>
<tr>
<td>Look online at independent expert website</td>
<td>38%</td>
</tr>
<tr>
<td>Look online at traditional news media website</td>
<td>37%</td>
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<tr>
<td>Immediately stop buying product until learn more (women more likely than men)</td>
<td>37%</td>
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<tr>
<td>Seek info from friends and family</td>
<td>33%</td>
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<tr>
<td>Look online at product mfg. website</td>
<td>32%</td>
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<td>Look online at government website</td>
<td>30%</td>
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*Top Box ratings (8-10)

**Most Likely Actions**

1. Search for more info online
2. Look online at independent expert websites
3. Tell friends and family
4. Look online at traditional news media website
Consumers Search Online for Info
And Talk to Family and Friends when Intensive Farming Practice Question Arises

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<td>Search for more info online</td>
<td>41%</td>
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**Most Likely Actions**
1. Search for more info online
2. Look online at independent expert websites
3. Tell friends and family
4. Look online at traditional news media website

**EARLY ADOPTERS**
1. Search for more info online
2. Look online at independent expert websites
3. Tell friends and family
4. Look online at traditional news media website
Tracking Attitudes Toward the Food Supply Over Time
Additional Attitudes Toward the Food Supply

- Consumers rated their agreement with several additional statements regarding the food supply.

- Used a 0 to 10 scale where “0” meant they strongly disagreed and “10” meant they strongly agreed with the statement:
  - 0 to 3 ratings indicate relatively low level of agreement
  - 4 to 7 ratings indicate relatively moderate level of agreement
  - 8 to 10 ratings indicate relatively strong level of agreement

- Consumers did not indicate strong agreement regarding the additional attitudinal statements.
  - Mean agreement scores ranged from 4.03 to 7.14, on the 0 to 10 scale.
Economics
“Food prices are a greater concern to me now than they were a year ago.”

2012 Mean 7.07*

2011 Mean 7.41

Five Year Mean
“With the increase in food prices, I am more likely to buy less expensive cuts of meat.”

Five Year Mean

2012 Mean 6.46

2011 Mean 6.75
"With the increase in food prices, we tend to eat out less often than one year ago."

Five Year Mean

2012 Mean 6.46

2011 Mean 6.72
“U.S. food is amongst the most affordable in the world today.”

2012 Mean 5.66

2011 Mean 5.98

Six Year Mean

Year
2007
2008
2009
2010
2011
2012
Mean
5.66
5.26
6.24
6.03
5.98
5.66

Years
2007
2008
2009
2010
2011
2012
Mean
5.66
5.26
6.24
6.03
5.98
5.66

2012
16% 60% 24%

2011
14% 56% 30%
Food Safety
“I am confident in the safety of the food I eat.”

Six Year Mean

2012 Mean 5.99

2011 Mean 6.32
“I am as confident in the safety of the food I eat as I was a year ago.”

Six Year Mean

2011 Mean 6.29
2012 Mean 5.92

2007 2008 2009 2010 2011 2012
0 to 3 4 to 7 8 to 10

0% 20% 40% 60% 80% 100%
“Today’s food supply is safer than it was when I was growing up.”
“Government food safety agencies are doing a good job ensuring the safety of the food we eat.”

- **2012 Mean**: 5.40
- **2011 Mean**: 5.63

**Additional Graph**

- **Five Year Mean**
  - 2008: 4.68
  - 2009: 5.59
  - 2010: 6.03
  - 2011: 5.63
  - 2012: 5.40
"I trust food produced in the U.S. more than I trust food produced outside the U.S."

Six Year Mean

2011 Mean 7.10
2012 Mean 6.90
"I have access to all of the information I want about where my food comes from, how it is produced and its safety."

![Chart showing food-related information with percentage distributions and mean values from 2011 to 2012.]

**2011 Mean 5.41**

**2012 Mean 5.54**

**Six Year Mean**

- 2007: 4.60
- 2008: 4.71
- 2009: 5.58
- 2010: 5.69
- 2011: 5.41
- 2012: 5.54
“I make a special effort to buy items produced in the United States.”

2012 Mean 6.13

2011 Mean 6.47

Five Year Mean

2008 2009 2010 2011 2012

“I don’t care where my food was produced as long as it is affordable, safe and wholesome.”

2012 Mean 5.43

2011 Mean 5.43

Six Year Mean
“Food grown organically is more healthful than conventionally grown food.”

- 2011 Mean 6.11
- 2012 Mean 6.22

Six Year Mean

- 2007: 6.13
- 2008: 5.88
- 2009: 5.85
- 2010: 5.73
- 2011: 6.11
- 2012: 6.22
Farm Animal Welfare
"If farm animals are treated decently and humanely, I have no problem consuming meat, milk and eggs."

2012 Mean 7.14

2011 Mean 7.20

Six Year Mean

2007 2008 2009 2010 2011 2012

7.68 7.41 7.08 7.29 7.20 7.14
“U.S. meat is derived from humanely treated animals.”

2012 Mean 5.24*

2011 Mean 5.38

Six Year Mean

0 to 3 4 to 7 8 to 10

2012
21% 59% 20%

2011
21% 56% 23%

2007 2008 2009 2010 2011 2012
5.02 4.80 5.50 5.89 5.38 5.24
"I would support a law in my state to ensure the humane treatment of farm animals."

2012 Mean 6.70

2011 Mean 6.72

Five Year Mean

- 2008: 6.91
- 2009: 6.81
- 2010: 7.22
- 2011: 6.72
- 2012: 6.70
"Farm animals that are raised for food should be treated the same way household pet owners treat their pets."

2011 Mean 5.67

2012 Mean 5.65

Six Year Mean

2007 2008 2009 2010 2011 2012

5.51 5.09 5.37 6.03 5.67 5.65
Sustainability
2012 Mean 5.32

2011 Mean 5.37

“I am more concerned about global warming than I was one year ago.”
“The U.S. has a responsibility to provide food for the rest of the world.”

2012 Mean 4.03*

2011 Mean 4.23

Two Year Mean

2011 2012

0% 20% 40% 60% 80% 100%

Two Year Mean

4.23

4.03
World hunger is more a matter of food distribution than exporting food from the U.S.”

2012 Mean 6.27

2011 Mean 6.36
‘It is more important for the U.S. to teach developing nations how to feed themselves than to export food to them.”

2011 Mean 7.35

2012 Mean 6.99*
Additional Attitudinal Statements in 2012
"Big corporations do not care much about my interests."

2012 Mean 7.04

- 0 to 3: 9%
- 4 to 7: 43%
- 8 to 10: 48%
Corporate America tends to ignore the needs of the average citizen.

2012 Mean 6.92
“Commercial farms are likely to put their interests ahead of my interests.”

2012 Mean 6.86
“Family farms are likely to put their interests ahead of my interests.”

2012 Mean 5.60
2012 Consumer Trust Research Webinars
November 9 – **Educating Consumers on the Benefits of GM Crops and Crop Protection Products**

Register at: [www3.gotomeeting.com/register/398422862](http://www3.gotomeeting.com/register/398422862)

November 16 – **Educating Consumers on the Benefits of Confinement Production, Antibiotics and Using Hormones in Beef Production**

Register at: [www3.gotomeeting.com/register/574343062](http://www3.gotomeeting.com/register/574343062)
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